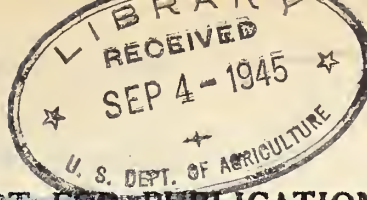


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LATE FOREIGN DEVELOPMENTS

INDIA: First all-India cotton report places 1942 area planted (to the end of July) at 11,089,000 acres compared with a first estimate of 12,475,000 for 1941 and a final unrevised 1941 estimate of 23,547,000 acres. Planting is spread over a much longer period than in most other countries, and the first forecast usually equals about 60 percent of the final figure.

COLOMBIA: The area now being planted to cotton for the 1942-43 crop is estimated officially at about 37,100 acres. No previous acreage figures are available.

BRAZIL: The area planted to cotton in Southern Brazil (excluding Bahia) for the 1940-41 crop was estimated officially at 4,547,000 acres compared with 3,748,000 for 1939-40. The totals for all Brazil thus were 6,740,000 acres for 1940-41, and 5,889,000 for 1939-40.

MOROCCO: Livestock numbers have increased in unusual proportions since the war began. Notwithstanding the large numbers of livestock on hand, however, urban centers are experiencing a meat shortage. The native stock raisers are not disposed to sell their stock unless they are certain of obtaining in exchange the commodities necessary for daily consumption such as, cloth, tea, and sugar. Moreover, the partial paralysis of transportation due to the shortage of petroleum products also makes the distribution of food supplies more difficult.

UNITED KINGDOM: The Ministry of Food announced that beginning August 30, 1942, milk consumption was restricted to 3 pints a week for each person except for expectant mothers, young children, and certain invalids, who will continue to obtain 1 pint a day. Dried milk will reappear on October 18, 1942, and will be issued more regularly than last year. The consumer will obtain it from the dealer with whom he is registered for sugar. In the 8 weeks from October 18, there will be 1 can, equal to 4 pints of milk, for every ration book. In addition, more sweetened condensed milk will be available under the point-rationing system.

CORRECTION: The estimate of 90,602 long tons (of 2,240 pounds) for the Egyptian flax crops appearing in Foreign Crops and Markets, August 24, 1942, page 222, referred to flax straw instead of fiber. Flax straw yields about 10 percent of fiber.

G R A I N SARGENTINE GRAIN SEEDINGS REDUCED . . .

The first official estimate of the Argentine wheat acreage sown in 1942 for harvest in 1942-43 is placed at 15,814,000 acres, as compared with the final estimate of 18,038,000 acres seeded in 1941. This indicates a reduction in area of about 12 percent, as compared with last year's seeded area, and it represents the smallest acreage seeded to wheat since 1935 and, with that exception, since 1921. Other small-grain seedings are also reported reduced, though to a somewhat lesser extent than wheat.

A serious drought condition spreading over much of the cereal producing area is the outstanding development affecting both area and condition of seedings, according to information received in the Office of Foreign Agricultural Relations. Burdensome supplies, lack of storage space, and reduced export outlets also characterize the wheat situation, factors which tend to be discouraging for wheat production at present.

The drought area includes the western half of the Province of Buenos Aires, the Territory of La Pampa, and southern Córdoba. This region normally accounts for about one-third of the total wheat area. The condition began in March, when precipitation was below the average of about 3 inches and through April, May, and June continued to be much less than the normally low average for these months. Rainfall during these 3 months (April-June) for representative stations in western Buenos Aires and in La Pampa was reported to be only 1.5 to 1.75 inches, contrasted with a normal supply of 4.5 to 6 inches during this period. Some relief was received around mid-August, which improved prospects in the south but was too late to aid wheat seeding there. Timely and generous rains will be needed from now on if crop prospects in the affected area are to be significantly benefited.

Under normal conditions the wheat acreage in this drought area would be about 6 million acres. Conditions vary, of course, within the drought district, but in the extreme southwestern part of the Province of Buenos Aires, only about half of the usual acreage had been seeded by mid-July, whereas the seeding is usually completed by July 1. Even if rainfall should soon make it possible to complete seeding, a switch from winter to early maturing varieties would probably be made, reports indicate. These early varieties are not so well suited to this region as are the winter varieties, such as Blackhull, Kanred, and others.

Germination and crop development in the seeded areas have also been delayed by cold weather and severe frosts, in addition to the drought conditions. This is in contrast to the usual mild winter weather. Present conditions in this area have been compared recently with the very poor 1929-30 season, when drought, followed by dust storms in August and September, resulted in one of the lowest yields on record.

On the other hand, in the remainder of the wheat zone, which includes most of Santa Fé and Córdoba and the eastern and extreme southern parts of the Province of Buenos Aires, sowing is proceeding on schedule, and conditions are considered satisfactory at this time. This area is much more important than the drought-affected region, and if conditions continue satisfactory or improve, it will greatly help to modify any adverse developments in other areas.

GRAIN: Acreage sown in Argentina, 1935-1942

Year	Wheat		Oats		Barley		Rye	
	Sown	Har-vested	Sown	Har-vested	Sown	Har-vested	Sown	Har-vested
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres
1935-36 .	14,208	11,690	2,953	1,366	1,940	1,253	1,749	573
1936-37 .	19,256	17,582	4,001	1,917	1,677	1,208	3,136	1,089
1937-38 .	20,717	17,244	3,974	1,770	1,712	1,125	2,963	504
1938-39 .	21,302	20,137	3,463	1,784	2,063	1,232	2,410	1,070
1939-40 .	17,833	12,734	3,446	2,068	2,121	1,633	2,296	1,233
Average	18,663	15,877	3,567	1,781	1,903	1,290	2,511	894
1940-41 .	17,507	15,472	3,941	a/	2,146	a/	3,327	a/
1941-42 .	18,038	14,254	3,519	a/	1,972	a/	2,661	a/
1942-43 b/	15,814	-	3,319	-	1,846	-	2,412	-

Compiled from official sources.

a/ Not available. b/ First estimate of probable acreage.

UNITED KINGDOM GRAIN HARVEST
PROSPECTS FAVORABLE . . .

Cereal crop prospects in the United Kingdom are reported favorable, and harvesting is now general, according to information received in the Office of Foreign Agricultural Relations. Average or above-average yields per acre on increased acreages of all grains is indicated, which should result in considerably larger supplies of domestic grain and less dependence upon imports. Weather conditions during recent weeks have been generally satisfactory for crop development and harvesting, though rains have caused lodging in many places and cool weather in July further delayed ripening and the harvest period.

Harvesting started in some early fields during the latter part of July but was not general for most grains until mid-August. Unsettled weather and lodging checked harvesting somewhat, so that it may be expected to continue active during the first part of September, at least. Normally, harvesting is largely concluded by early September except in highland areas.

The August forecast of yields indicated an outturn for wheat of 36.4 bushels per acre as compared with an average yield of 34.2 bushels per acre for the 10 years 1932-1941 and a yield of 33.3 bushels per acre in 1941. In the northeastern counties of England, wheat prospects are reported especially favorable, with yields expected to average 37 bushels per acre. Rust has appeared in some areas, but there have been no reports of serious damage.

For barley and oats, above average yields were also indicated in the August condition report. A barley yield of 41.3 bushels per acre was forecast, compared with a 10-year average of 38.6 bushels per acre and a 1941 yield of 36.2 bushels per acre. The oats yield was forecast at 59.1 bushels per acre as compared with a 10-year average of 57.6 bushels.

GRAIN: Area and production in the United Kingdom, 1935-1942

Year	Wheat		Barley		Oats	
	Acreage	Production	Acreage	Production	Acreage	Production
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>acres</u>	<u>bushels</u>	<u>acres</u>	<u>bushels</u>	<u>acres</u>	<u>bushels</u>
1935	1,882	65,445	871	34,300	2,518	145,530
1936	1,805	55,253	894	34,160	2,514	138,670
1937	1,836	56,336	906	30,707	2,298	129,290
1938	1,928	73,360	988	42,187	2,395	139,440
1939	1,766	61,413	1,012	41,627	2,426	140,210
Average	1,843	62,361	934	36,596	2,430	138,628
1940	1,809	61,264	1,339	51,520	3,399	202,440
1941	2,265	75,376	1,475	53,340	3,951	227,150
1942	2,543	a/92,624	1,547	a/63,887	4,124	a/243,810

Compiled from official and trade sources. a/ August forecast.

RAINS CHECK CANADIAN GRAIN HARVEST . . .

Untimely rains, which were very heavy at a number of points, halted harvest operations in western Canada during the last week of August and increased difficulties of gathering the very large crop, according to the Dominion Bureau of Statistics. Wind and hail accompanied the rainstorms and made for additional lodging, especially of oats, which, it is feared, may result in considerable loss. Cutting is largely completed in Manitoba but little threshing has been done. In Saskatchewan at the end of the month it was estimated that 11 percent of the wheat and 35 percent of coarse grains had been cut, and in Alberta, although a considerable area of barley and oats is reported harvested, much grain is still green. Some big yields of wheat are expected, and it is now believed that frost would largely affect quality rather than yield.

MEXICO EXPECTS LARGE RICE HARVEST . . .

Present indications point toward another record rice crop in Mexico, as a preliminary estimate places production at 6 million bushels. High prices last spring induced about a 25-percent expansion in acreage this season compared with 1941. Weather conditions to date have been reported favorable, with ample rainfall in most districts. Furthermore, the construction of dams for irrigation purposes, particularly in the State of Sonora, has increased the potential areas for rice production.

MEXICO: Rice acreage, production, and yield,
average 1931-1935, annual 1936-1942

Year	Acreage	Production	Yield per acre
	<u>Acres</u>	<u>1,000 bushels</u>	<u>Bushels</u>
Average 1931-1935.....	81,489	3,437	42
1936.....	98,185	4,224	43
1937.....	98,840	3,655	37
1938.....	97,365	3,925	40
1939.....	111,328	5,050	46
1940.....	152,038	5,277	35
1941.....	135,650	5,551	41
1942 a/.....	173,000	6,000	35

Compiled from official sources. a/ Estimated.

If the harvest this season turns out as large as is now indicated, Mexico should have ample rice for domestic requirements and have a surplus available for export. Rice, however, is one of the commodities of which exports are now prohibited. This measure was applied in April to stop speculation in rice, which had forced prices to a high level. Wholesale prices for first quality rice in Mexico City during May averaged \$3.40 per 100 pounds as compared with \$2.80 in May 1941. It is uncertain when the Government will remove rice from the list of prohibited exports.

MEXICO: Rice imports, exports, and net exports,
average 1931-1935, annual 1936-1941

Year	Exports	Imports	Net exports
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
Average 1931-1935	16,734	363	16,371
1936	29,696	44	29,652
1937	44,026	22	44,004
1938	14,198	1,565	12,633
1939	4,854	10	4,844
1940	1	94	-93
1941	16,139	192	15,947

Compiled from official sources.

* * * * *

L I V E S T O C K A N D A N I M A L P R O D U C T SWAR DEMAND RESULTS IN LARGER ARGENTINE
MEAT PRODUCTION AND EXPORT . . .

War demands and accompanying high prices resulted in increased meat production in Argentina in 1941. 1/ Production of meat is provisionally estimated at 5,500 million pounds, an increase of 6 percent above 1940. Beef, veal, and pork production increased, whereas the output of mutton and lamb was below the large quantity produced in 1940. Indications are that the peak in meat production was reached in 1941 and that the output in 1942 may be about the same or slightly under that of 1941. Latest reports indicate that the unusually severe winter (June-August) of 1942 and the drought are having a detrimental effect on grazing lands. Stock in certain sections had to be moved for better feeding.

Beef represented almost 90 percent of the total quantity of meat produced in Argentina in 1941 and around 80 percent of the quantity exported. Argentina leads the world as a beef exporter, as about 50 percent of the world's export of beef is from that country. Pork production in Argentina increased materially during the past year as a result of abundant supplies of corn available at low prices. Commercial pork production in 1941 is estimated at the record total of 307 million pounds, an increase of 47 percent above 1940. There is no estimate of the slaughter of hogs on farms.

ARGENTINA: Production of meat in packing plants
compared with total production, 1935-1941

Year	Production in packing plants			Total production, including farm a/			Packing-house production as percentage of total		
	Beef	Lamb	Pork	Beef	Lamb	Pork	Beef	Lamb	Pork
	and veal	and mutton		and veal	and mutton	b/	and veal	and mutton	b/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Per-cent	Per-cent	Per-cent
1935	1,609	176	157	4,173	307	219	39	57	72
1936	1,740	189	172	4,167	315	240	42	60	72
1937	1,932	190	177	4,546	309	258	44	61	69
1938	1,635	223	119	4,494	361	198	41	62	60
1939	2,025	194	98	4,803	329	207	42	59	47
1940	1,831	218	101	4,623	362	209	40	60	48
1941	2,187	218	202	c/4,880	340	c/307	45	64	66

Compiled from official sources unless otherwise noted.

a/ Obtained by multiplying total estimated slaughter by average dressed weights at packing plants. b/ Excludes farm production of pork.

c/ Preliminary estimate.

1/ See Foreign Crops and Markets, July 27, 1942; for price discussion.

British contracts for pork have almost absorbed the entire surplus as indicated in the following table showing exports by countries.

ARGENTINA: Exports of principal meats by country of destination, annual 1938-1941, and January-March 1941, 1942

Item and destination	1938	1939	1940	1941 a/	January-March 1941	January-March 1942
BEEF AND VEAL	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Chilled type:						
United Kingdom	755	770	589	632	183	194
France	b/	7	36	b/	b/	b/
Others	0	2	1	7	3	0
Total	755	779	626	639	186	194
Frozen:						
United Kingdom	27	39	30	180	23	43
France	17	69	137	2	2	-
Belgium and Netherlands	11	8	b/	b/	-	-
Germany	108	97	-	-	-	-
Italy	31	20	25	b/	-	-
Spain	21	b/	b/	3	c/	1
Japan	3	2	b/	1	c/	c/
Others	7	9	5	6	2	2
Total	226	244	197	192	27	46
Canned:						
United States	41	41	26	72	9	26
Canada	5	8	4	3	c/	c/
Union of South Africa.	3	3	6	4	c/	c/
United Kingdom	96	115	130	194	66	33
France	2	b/	3	c/	-	-
Scandinavia d/	3	2	b/	e/3	c/	c/
Belgium and Netherlands	2	2	1	b/	-	-
Spain	2	b/	-	b/	b/	b/
Japan	1	b/	-	b/	c/	c/
Others	9	11	6	18	12	17
Total	164	182	176	294	87	76
Salted beef f/	11	9	4	4	g/ 1	1
Total beef, including canned	1,156	1,214	1,003	1,129	301	317
LAMB AND MUTTON						
Frozen and chilled:						
United Kingdom	96	115	131	108	28	56
France	6	3	4	b/	b/	-
Others	3	3	1	2	1	0
Total	105	121	136	110	29	56
PORK						
Frozen and chilled:						
United Kingdom	17	13	2	66	10	24
Others	1	1	1	2	0	0
Total	18	14	3	68	10	24

ARGENTINA: Exports of principal meats by country of destination,
annual 1938-1941, and January-March 1941, 1942 - Continued

Item and destination	1938	1939	1940	1941 a/	January-March	
					1941	1942
PORK, CONTINUED	Million	Million	Million	Million	Million	Million
Hams and bacon:	pounds	pounds	pounds	pounds	pounds	pounds
United Kingdom	12	9	1	b/	-	-
Others	2	1	1	2	-	-
Total	14	10	2	2	b/	b/
Salt pork:						
United Kingdom	3	3	1	b/	-	-
Others	1	1	0	b/	-	-
Total	4	4	1	1	b/	b/
Total pork	36	28	6	71	10	24
Frozen offals:						
United Kingdom	57	63	59	58	13	18
France	3	2	b/	b/	-	-
Germany	b/	1	-	c/	-	-
Italy	4	1	1	c/	-	-
Others f/	b/	b/	1	1	0	1
Total	64	67	61	59	13	18
Total specified meats ..	1,361	1,430	1,206	1,369	353	415

Compiled from Anuario del Comercio Exterior and Boletín Mensual Agropecuario.

a/ Preliminary. b/ Less than 500,000 pounds. c/ Not mentioned separately; included with "Others" if any. d/ Finland included. e/ Principally to Finland. f/ Mostly to United States, British, Spanish, French, Netherland, and Portuguese possessions in the Western Hemisphere. g/ May include some pork.

Cattle numbers in Argentina were officially estimated at 34,318,000 in June 1938, and it is estimated that the number is now somewhat smaller. The census of 1930 reported 32,212,000 head on hand. It is believed that numbers reached record levels in 1922, although a comparable mid-winter (June 30) estimate is not available for that year. In December 1922 the number reached 37,065,000 head. Statistics for the Province of Buenos Aires, where about 42 percent of Argentine cattle were found in 1922, indicate that numbers in Argentina were larger during 1921-1923 than at any time previously.

Although beef exports in 1941, reported at 1,129 million pounds, often have been exceeded, they were larger than the average for the 5 years 1932 to 1936, and exceeded exports in 1940 by 13 percent. Exports in 1942 will about equal those of 1941, according to present indications. Moreover, exports exceeded those for the year 1922, when cattle numbers were largest, by 16 percent. In 1924, beef exports were the largest on record as a result of increased continental European demand for beef following recovery from the war of 1914-1918. Exports continued at a high level for the following 3 years and caused a drain on breeding stock and calves, as the proportion of cows and calves slaughtered in those years was the highest on record. This increased slaughter of breeding stock

and of young animals was partly instrumental in bringing about the reduction in cattle numbers which became apparent according to the 1930 census.

ARGENTINA: Slaughter in packing plants and at other slaughter houses, 1909-1941

Item and date	Freezing and chilling plants	Total salting and canned meat plants	Linier's slaughter house a/	Municipal and private slaughter houses a/	Total excluding farm
<u>CATTLE AND CALVES</u>	1,000	1,000	1,000	1,000	1,000
5-year average -	head	head	head	head	head
1909-1913	1,154	366	612	883	3,015
1914-1918	2,021	203	404	1,150	3,778
1919-1923	2,051	183	665	1,429	4,328
1924-1928	3,255	480	992	2,240	6,967
1929-1933	2,465	234	871	2,137	5,707
1934-1938	2,945	178	1,038	2,502	6,672
Annual -					
1939	3,269	293	1,173	2,721	7,456
1940	2,924	240	1,201	2,619	6,894
1941	3,552	223	1,208	b/ 2,417	b/ 7,400
<u>SHEEP AND LAMBS</u>					
5-year average -					
1910-1913 c/	3,402	51	880	644	4,977
1914-1918	2,436	-	770	484	3,690
1919-1923	3,745	d/	901	701	5,347
1924-1928	4,553	13	590	419	5,575
1929-1933	5,335	21	718	838	6,912
1934-1938	5,673	17	656	973	7,023
Annual -					
1939	5,673	26	706	1,277	7,682
1940	5,761	22	567	1,168	7,518
1941	5,884	3	626	b/ 787	b/ 7,300
<u>HOGS</u>					
5-year average -					
1910-1913 c/	12	-	84	39	135
1914-1918	95	a/ 1	152	89	337
1919-1923	247	a/ 6	202	110	565
1924-1928	207	a/ 31	276	85	599
1929-1933	455	a/ 35	360	153	1,003
1934-1938	909	a/ 44	287	159	1,399
Annual -					
1939	495	a/ 52	363	246	1,156
1940	509	a/ 58	379	230	1,176
1941	965	a/ 56	424	b/ 155	b/ 1,600

Compiled from official sources. a/ Mostly for domestic consumption.
b/ Preliminary estimates. c/ 4-year average. d/ Less than 500 head.

The proportion of cattle and calves entering domestic consumption is increasing at present. In 1940, 70 percent of the total number of cattle and calves slaughtered was for domestic consumption, whereas, in 1930 the percentage entering domestic consumption channels was about 64 percent. Argentine consumption of beef per capita is large and amounted to approximately 282 pounds in 1941. The only other country where per capita consumption approaches that of Argentina is New Zealand.

Total meat exports from Argentina were larger in 1941 than in 1940 by 15 percent but were still 4 percent below 1939. Exports of beef, including canned meat, totaled 1,129 million pounds, an increase of 13 percent above 1940. There was also a very substantial increase in exports of pork, especially frozen, from 6 million pounds to 71 million pounds. Mutton and lamb exports decreased 19 percent to 110 million pounds.

The United Kingdom took a materially larger percentage of Argentine meat in 1941 than formerly and absorbed most of the quantity normally going to continental European destinations. Exports to the United Kingdom totaled 1,116 million pounds, or 82 percent of the total, whereas in 1939 and 1940 only 74 percent and 70 percent, respectively, went to that destination. Beef exports, including canned, to that market totaled 1,006 million pounds against 749 million pounds in 1940, pork exports increased from only 6 million pounds in 1940 to 71 million in 1941; but mutton and lamb exports decreased about 13 percent.

Argentine-British negotiations for the fourth contract year will assume unusual importance this year, as the mobile tax on exports projected by the Ministry of Finance, which is particularly burdensome for cattle breeders, will depend partly on the form the contract will take. It is too early to give details.

A further heavy increase in exports to the United Kingdom is not expected, as any large military action will be a drain on refrigerated shipping space - also the United States is increasing exports of dehydrated meat to the United Kingdom. The United Kingdom has discontinued the distribution of corned beef for general consumption. The British meat ration formerly consisted of 1 shilling's worth of meat and corned beef worth 2 pence weekly.

Argentine canned-meat exports to the United States were considerably larger in 1941 than in other recent years, amounting to 72 million pounds, an increase of 177 percent above 1940. Canned beef, including corned, is one of the commodities specified in the United States General Imports Order, M 63, and amendments, that may be imported only by the Government through one of its agencies and is reserved principally for use of the armed forces.

SHORTAGE OF SHEEPSKINS SEEN
IN EUROPE THIS WINTER . . .

The use of sheep- and lambskins for clothing has grown in importance in Axis countries in view of short supplies of other raw materials and particularly because of winter requirements on the Russian front. If the demand were stabilized at pre-war consumption, it is believed that Germany could make ends meet by seizing supplies from occupied countries. With the increasing need for suitable clothing during winter military activities, however, the Germans are hard pressed for skins of all types.

Before the war, Germany imported about 75 percent of sheep- and lambskin requirements. Although these supplies may be had in substantial quantities from France, Italy, and the Balkans, available European supplies for 1942 indicate that a reduction of 15 percent is expected as compared with pre-war averages.

Sheep- and lambskins can be used in either a woolled or a de-wooled state. In the former case they would be tanned, dressed, and turned into clothing such as sheepskin coats, and, in the latter case, they would be tanned and made into leather. The woolled skins have become of exceptional importance to the enemy from a military point of view. There was a large demand last winter for warm clothing on the part of Axis troops in Russia. Sheepskin coats, caps, gloves, and other apparel were among the essential garments needed. The shorn pelt of the sheep and the full-wooled lambskins are best suited for this purpose. The de-wooled skins, although used for a large number of purposes, now find their greatest value as leather for jackets, and uppers or upper linings of footwear.

In 1937 the total supply of sheep- and lambskins available for consumption in Germany was 57,981,000 pounds, of which 44,533,000 pounds were imported. In 1938 the quantities available for consumption were 80,027,000 pounds, of which 58,642,000 pounds were imported. In addition, Germany imported 10,187,000 pounds of leather produced from sheep, lambs, goats, and kids in 1937 and 12,436,000 pounds in 1938. The major portion of these leather imports was in the form of dressed sheep and lamb leather.

No estimate of present consumption of sheep- and lambskins is possible, owing to the variety of uses of these skins and to the fact that they are only subsidiary to the supply of other more important raw materials. The following table indicates the estimated amount of sheep- and lambskins to be produced in Axis-dominated countries in 1942. While the total supply of 94 million pounds is higher than Germany's 1938 consumption of 80 million pounds, a very substantial portion of these skins will be consumed in the countries where they originated.

SHEEP- AND LAMBSKINS: Production in specified European countries, 1942, and 1942 slaughterings with comparison

Country	Pre-war slaughterings	Estimated 1942 slaughterings	Estimated 1942 production
	Thousands	Thousands	Thousand pounds
Germany and Austria ...	1,974	1,774	9,370
Czechoslovakia	210	170	712
Poland	730	510	2,139
Yugoslavia	1,080	970	3,247
Greece	4,000	2,400	9,524
Hungary	250	225	893
Rumania	1,370	1,300	5,159
Italy	6,000	6,000	22,134
France	7,430	6,300	26,455
Belgium	130	106	516
Netherlands	340	270	1,543
Denmark	80	55	291
Norway	750	600	4,365
Finland	580	400	1,499
Bulgaria	1,640	1,560	5,842
Total	26,564	22,640	94,289

Ministry of Economic Warfare, London.

It is estimated that nearly 4 million short sheepskin coats could be manufactured from the total quantity of sheep- and lambskins produced in 1942; in actual practice, however, a large proportion of the skins would not be suitable for clothing and would be needed for other uses.

Although Germany is cut off from all overseas sources of supply, certain accessible neutral countries can furnish large quantities of sheep- and lambskins. Spain, Turkey, and the Middle East, in particular, have large sheep populations, and the export trade of these countries has been, to a great extent, in German hands. Spain and Turkey enjoyed a favorable export trade of sheep- and lambskins with Axis countries during 1941. Steps have been taken by the British to limit, as far as possible, the supplies that might reach Germany. The British increased their activities in buying up available supplies of sheep- and lambskins that ordinarily go to Germany or other Axis countries. As a result of British activity in the Middle East, there is little evidence of exports from that area to Axis countries. Negotiations have been made with Spain and Turkey to restrict exports of certain skins to Germany or other Axis countries. These restrictions, coupled with the buying on the part of the British, should have the desired effect of curtailing exports to Germany and the occupied countries during 1942-43.

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